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GENERAL SERVICES ADMINISTRATION

41 CFR Parts 301-11 and 301-74

[FTR Amdt. 89]

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Federal Travel Regulation; Conference Planning

AGENCY: Office of Governmentwide Policy, GSA.

ACTION: Final rule.

SUMMARY: The General Services Administration (GSA) is amending the Federal Travel Regulation (FTR) governing conference planning. Because conferences have different requirements than routine temporary duty (TDY) travel, GSA is providing specific guidance to minimize overall Government expenses associated with conferences. This amendment will reduce agency costs by easing the administrative burden of conference planning and processing.

EFFECTIVE DATE: This final rule is effective January 14, 2000.

FOR FURTHER INFORMATION CONTACT: Jim Harte, Travel Team Leader, Travel Management Policy Division (MTT), telephone 202-501-0483.

SUPPLEMENTARY INFORMATION:

A. Background

A proposed rule with request for comments was published in the Federal Register on September 15, 1999 (64 FR 50051). All comments received were considered in the formulation of the final rule. GSA received a total of 176 comments from the Federal Government and the private sector. Of those, 171 expressed support of the proposed changes and five asked for clarification and/or offered suggested improvements.

What are the Significant Comments and Changes?

Comments and adopted changes are:

(a) Government policy usage. A private sector organization stated that the proposed change constitutes ``good, common sense." Additionally, it questioned whether it is prudent to include this level of detail in the FTR, since Government and contractor organizations are confronted with a myriad of different circumstances, and some flexibility is needed. It also stated that when the FTR lists examples and such language as ``not limited to," the user tends to adopt role compliance in lieu of judgment. While it is unclear what ``role compliance" is, GSA recognizes that some contractors mirror the FTR in developing their own travel rules, but only Federal employees and agencies are subject to the FTR. No significant change, therefore, has been made in the FTR policy.

(b) Federal Management Regulation (FMR) versus the FTR. Because this policy encompasses a much broader range of agency management than the travel function, i.e., procurement, facilities, general and administrative services, an agency questioned why this guidance isn't issued as an FMR. This final rule focuses on the total costs involved in employee travel to conferences and, therefore, is appropriate as part of the FTR.

(c) Interagency Travel Management Committee (ITMC). One comment questioned how the ITMC will serve as a resource for planning a conference when it is not directly involved in making conference arrangements. GSA has organized the ITMC as a forum of approximately 100 Federal travel policy and financial managers. Active communication and sharing of information will ease conference planning for those Federal agencies that have an infrequent need to plan a conference.

(d) Rules to co-sponsor a conference with an outside organization. One comment suggested that the final rule should address situations in which a Federal agency co-sponsors a conference with an outside organization. Depending on who the co-sponsor is, the conference planners may have to consider ethics guidelines, financial assistance regulations, and acquisition laws and regulations. For policy regarding acceptance of payment from a non-Federal source, GSA refers users to FTR Chapter 304 which is written in consultation with the Office of Government Ethics.

(e) Conference information package. The third sentence of Appendix E to Chapter 301, ``Conference Information Package," states that ``You should finalize the package and send it to the printer at least 4 weeks in advance of the starting date." It was suggested that this is an ideal but unrealistic time frame for preparing materials since many conferences need to be planned with only one month's notice. GSA agrees, and has amended the sentence to allow the time frame as an option.

(f) Light refreshments. To eliminate the possibility of agency or individual abuse, specific guidance was requested to define ``light refreshments." While GSA does not want to limit agencies to a specific menu of light refreshments (intended only as a refresher, not intended to serve as a meal), Sec. 301-74.10 is revised to add a suggested list of considerations. The serving of light refreshments for conference attendees during morning, afternoon and evening breaks, authorized by 5 U.S.C. 5702, is a common business practice, and should not be

prohibited for Government-sponsored conferences.

(g) Retention of records. One comment recommended that this rule set a threshold based on number of attendees for the retention of records. The comment stated that without specific guides, any event of whatever size that had one or more attendees in travel status would appear to be subject to the record retention requirements. Such an all-encompassing rule would run counter to the overall Federal goal of reducing unnecessary paperwork and would have no apparent benefit for small events. GSA agrees, and has revised Sec. 301-74.19 to require records for each conference the agency sponsors or funds, in whole or in part for 30 or more attendees. The National Archives and Records Administration issues the General Record Schedules to provide Governmentwide authority to destroy records common to several or all agencies of the Federal Government. The General Accounting Office has responsibility for approving the disposal of certain Federal records, including those relating to claims or demands by or against the Government, and those subject to audit. If Federal agencies need assistance to ensure adherence for the retention of records, GSA suggests that agencies contact their agency records officers.

B. Executive Order 12866

GSA has determined that this final rule is not a significant regulatory action for the purposes of Executive Order 12866 of September 30, 1993.

C. Regulatory Flexibility Act

This final rule is not required to be published in the Federal Register for notice and comment; therefore, the Regulatory Flexibility Act does not apply.

D. Paperwork Reduction Act

The Paperwork Reduction Act does not apply because the final rule does not impose recordkeeping or information collection requirements, or the collection of information from offerors, contractors, or members of the public which require the approval of the Office of Management and Budget under 44 U.S.C. 501 et seq.

E. Small Business Regulatory Enforcement Fairness Act

This final rule is also exempt from Congressional review prescribed under 5 U.S.C. 801 since it relates solely to agency management and personnel.

List of Subjects in 41 CFR Parts 301-11 and 301-74

Government employees, Travel and transportation expenses.

For the reasons set forth in the preamble, 41 CFR parts 301-11 and 301-74 are amended as follows:

PART 301-11--PER DIEM EXPENSES

1. The authority citation for part 301-11 continues to read as follows:

Authority: 5 U.S.C. 5707.

2. Section 301-11.5 is revised to read as follows:

Sec. 301-11.5 How will my per diem expenses be reimbursed?

Per diem expenses will be reimbursed by the:

- (a) Lodgings-plus per diem method;
- (b) Reduced per diem method;
- (c) Conference lodging allowance method (see Secs. 301-74.7 and 301-74.22 of this chapter);

or

- (d) Actual expense method.

3. Part 301-74 is revised to read as follows:

PART 301-74--CONFERENCE PLANNING

Subpart A--Agency Responsibilities

Sec.

301-74.1 What policies must we follow in planning a conference?

301-74.2 What costs should be considered when planning a conference?

301-74.3 What must we do to determine which conference expenditures result in the greatest advantage to the Government?

301-74.4 What should cost comparisons include?

301-74.5 How should we select a location and a facility?

301-74.6 What can we do if we cannot find an appropriate conference facility at the chosen locality per diem rate?

301-74.7 What is the conference lodging allowance?

301-74.8 Who may authorize reimbursement of the conference lodging allowance for a Government sponsored conference?

- 301-74.9 Who may authorize reimbursement of the conference lodging allowance for a non-Government sponsored conference?
- 301-74.10 May the conference lodging allowance ever exceed 25 percent above the lodging per diem rate?
- 301-74.11 May we provide light refreshments at an official conference?
- 301-74.12 May we use both the conference lodging allowance and the actual expense method of reimbursement concurrently?
- 301-74.13 May we include conference administrative costs in an employee's per diem allowance payment for attendance at a conference?
- 301-74.14 Are there any special requirements for sponsoring or funding a conference at a hotel, motel or other place of public accommodation?
- 301-74.15 May we waive the requirement in Sec. 301-74.14?
- 301-74.16 What must be included in any advertisement or application form relating to conference attendance?
- 301-74.17 What special rules apply when a conference is held in the District of Columbia?
- 301-74.18 What policies and procedures must we establish to govern the selection of conference attendees?
- 301-74.19 What records must we maintain to document the selection of a conference site?

Subpart B--Conference Attendees

- 301-74.21 What is the applicable M&IE rate when meals or light refreshments are furnished at nominal or no cost by the Government or are included in the registration fee?
- 301-74.22 When may an employee, attending a conference, be authorized the conference lodging allowance?
- 301-74.23 Is the conference lodging allowance an actual expense reimbursement?
- 301-74.24 When should actual expense reimbursement be authorized for conference attendees?

Authority: 5 U.S.C. 5707.

Subpart A--Agency Responsibilities

Note to Subpart A: Use of pronouns ``we", ``you", and their variants throughout this subpart refers to the agency.

Sec. 301-74.1 What policies must we follow in planning a conference?

When planning a conference, you must:

- (a) Minimize all conference costs, including administrative costs, conference attendees' travel costs, and conference attendees' time costs;
- (b) Maximize the use of Government-owned or Government provided conference facilities as much as possible;

(c) Identify opportunities to reduce costs in selecting a particular conference location and facility (e.g., through the availability of lower rates during the off-season at a site with seasonal rates); and

(d) Develop and establish internal policies to ensure these standards are met.

Sec. 301-74.2 What costs should be considered when planning a conference?

When planning a conference, you should consider all direct and indirect conference costs paid by the Government, whether paid directly by agencies or reimbursed by agencies to travelers or others associated with the conference. Some examples of such costs are:

- (a) Authorized travel and per diem expenses;
- (b) Hire of rooms for official business;
- (c) Audiovisual and other equipment usage;
- (d) Computer and telephone access fees;
- (e) Light refreshments;
- (f) Printing;
- (g) Registration fees;
- (h) Ground transportation; and
- (i) Employees' time at the conference and on en route travel.

Sec. 301-74.3 What must we do to determine which conference expenditures result in the greatest advantage to the Government?

To determine conference expenditures, you must:

- (a) Assure there is appropriate management oversight of the conference planning process;
- (b) Always do cost comparisons of the size, scope, and location of the proposed conference;
- (c) Determine if a Government facility is available at a cheaper rate than a commercial facility;
- (d) Consider alternatives to a conference, e.g. teleconferencing; and
- (e) Maintain written documentation of the alternatives considered and the selection rationale used.

Sec. 301-74.4 What should cost comparisons include?

Cost comparisons should include, but not be limited to, a determination of adequacy of lodging rooms at the established per diem rates, overall convenience of the conference location, fees, availability of meeting space, equipment, and supplies, and commuting or travel distance of attendees. (See Appendix E to Chapter 301, Guidance for Conference Planning.)

Sec. 301-74.5 How should we select a location and a facility?

Site selection is a final decision as to where to hold your conference. The term "site" refers to both the geographical location and the specific facility(ies) selected. In determining the best site in the interest of the Government, you should exercise strict fiscal responsibility to minimize costs. The actions in Sec. 301-74.3 must be followed. Cost comparisons must cover factors such as those listed in Sec. 301-

74.4. As part of the cost comparison, you must use the established per diem rate for the locations for which you are comparing costs.

Sec. 301-74.6 What can we do if we cannot find an appropriate conference facility at the chosen locality per diem rate?

While it is always desirable to obtain lodging facilities within the established lodging portion of the per diem rate for the chosen locality, it may not always be possible. In negotiating lodging rates with the properties in the chosen location, you may exceed the established lodging portion of the per diem rate by up to 25 percent under Secs. 301-74.8 and 301-74.9, if necessary. This will provide flexibility in selecting an appropriate property at the most advantageous location. It will also permit agencies to reimburse their employees' subsistence expenses by using the conference lodging allowance method as prescribed in Sec. 301-74.8 for a Government sponsored conference and in Sec. 301-74.9 for non-Government sponsored conferences, rather than the actual expense method prescribed in subpart D of part 301-11 of this chapter.

Sec. 301-74.7 What is the conference lodging allowance?

The conference lodging allowance is a pre-determined maximum allowance of up to 25 percent greater than the applicable locality lodging portion of the per diem rate. Under this reimbursement method, employees will be reimbursed the actual amount incurred for lodging up to the conference lodging allowance.

Sec. 301-74.8 Who may authorize reimbursement of the conference lodging allowance for a Government sponsored conference?

The approval authority for the conference lodging allowance is the Government agency sponsoring the conference. The sponsoring agency will determine the appropriate conference lodging allowance, up to 25 percent above the established lodging allowance for the chosen location, and that rate shall be allowable for all employees of any agency authorized to attend the conference. The determination must be made by a senior agency official at the sponsoring agency.

Sec. 301.74.9 Who may authorize reimbursement of the conference lodging allowance for a non-Government sponsored conference?

The travel approving official of a Government employee authorized to attend a non-Government sponsored conference may authorize the employee to be reimbursed for lodging expenses incurred up to the conference lodging allowance rate.

Sec. 301-74.10 May the conference lodging allowance ever exceed 25 percent above the lodging per diem rate?

No, the conference lodging allowance may not exceed 25 percent above the applicable locality lodging per diem rate.

Sec. 301-74.11 May we provide light refreshments at an official conference?

Yes. Agencies sponsoring a conference may provide light refreshments to agency employees attending an official conference. Light refreshments for morning, afternoon or evening breaks are defined to include, but not be limited to, coffee, tea, milk, juice, soft drinks, donuts, bagels, fruit, pretzels, cookies, chips, or muffins.

Sec. 301-74.12 May we use both the conference lodging allowance method and the actual expense method of reimbursement concurrently?

No. You must only use one reimbursement method per day in accordance with Sec. 301-11.4 of this chapter.

Sec. 301-74.13 May we include conference administrative costs in an employee's per diem allowance payment for attendance at a conference?

No. Per diem is intended only to reimburse the attendee's subsistence expenses. You must pay conference registration fees separately, either directly or by reimbursing employees who pay such expenses and submit travel claims.

Sec. 301-74.14 Are there any special requirements for sponsoring or funding a conference at a hotel, motel or other place of public accommodation?

Yes. When you sponsor or fund (see 15 U.S.C. 2225a), in whole or in part, a conference at a place of public accommodation in the United States, you must use an approved accommodation (see Sec. 300-3.1 of this title), except as provided in Sec. 301-74.15. This provision also applies to the government of the District of Columbia when it expends Federal funds for a conference and any non-Federal entity which uses Government funds to sponsor or fund a conference.

Sec. 301-74.15 May we waive the requirement in Sec. 301-74.14?

Yes, if the head of your agency makes a written determination on an individual case basis that waiver of the requirement to use approved accommodations is necessary in the public interest for a particular event. Your agency head may delegate this waiver authority to a senior agency official or employee who is given waiver authority with respect to all conferences sponsored or funded, in whole or in part, by your agency.

Sec. 301-74.16 What must be included in any advertisement or application form relating to conference attendance?

(a) Any advertisement or application for attendance at a conference described in Sec. 301-74.14 must include:

- (1) Notice of the prohibition against using a non-FEMA approved place of public accommodation for conferences; and
- (2) Notice that the conference lodging allowance applies to Federal attendees, if applicable.

(b) In addition, any executive agency, as defined in 5 U.S.C. 105, shall notify all non-Federal entities to which it provides Federal funds of this prohibition.

Sec. 301-74.17 What special rules apply when a conference is held in the District of Columbia?

In addition to the general rules provided in this part, the following special rules apply:

- (a) You may not directly procure lodging facilities in the District of Columbia without specific authorization and appropriation from Congress (see 40 U.S.C. 34); and
- (b) Any short-term conference meeting space you obtain in the District of Columbia must be procured under 41 CFR 101-17.101-4.

Note to Sec. 301-74.17(a): This provision does not prohibit payment of per diem to an employee authorized to obtain lodging in the District of Columbia while performing official business travel.

Sec. 301-74.18 What policies and procedures must we establish to govern the selection of conference attendees?

You must establish policies that reduce the overall cost of conference attendance. The policies and procedures must:

- (a) Limit your agency's representation to the minimum number of attendees determined by a senior official necessary to accomplish your agency's mission; and
- (b) Provide for the consideration of travel expenses when selecting attendees.

Sec. 301-74.19 What records must we maintain to document the selection of a conference site?

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For each conference you sponsor or fund, in whole or in part for 30 or more attendees, you must maintain a record of the cost of each alternative conference site considered. You must consider at least three sites. You must make these records available for inspection by your Office of the Inspector General or other interested parties.

Subpart B--Conference Attendees

Note to subpart B: Use of pronouns ``we'', ``you'', and their variants throughout this subpart refers to the agency.

Sec. 301-74.21 What is the applicable M&IE rate when meals or light refreshments are furnished at nominal or no cost by the Government or are included in the registration fee?

When meals or light refreshments are furnished at nominal or no cost by the Government or are included in the registration fee the applicable M&IE will be calculated as follows:

(a) If meals are furnished the appropriate deduction from the M&IE rate must be made (see Sec. 301-11.18 of this chapter.

(b) If light refreshments are furnished, no deduction of the M&IE allowance is required.

Sec. 301-74.22 When may an employee, attending a conference, be authorized the conference lodging allowance?

An employee, authorized to attend a conference, may be authorized the conference lodging allowance as prescribed in Secs. 301-74.8 and 301-74.9.

Sec. 301-74.23 Is the conference lodging allowance an actual expense reimbursement?

No. The conference lodging allowance is a separate method of reimbursement for lodgings expenses.

Sec. 301-74.24 When should actual expense reimbursement be authorized for conference attendees?

If the conference lodging allowance still is inadequate, you may authorize actual expense reimbursement under Sec. 301-11.300 of this chapter in lieu of the conference lodging allowance method.

4. Chapter 301 is amended by adding Appendix E to read as follows:

Appendix E to Chapter 301--Suggested Guidance for Conference Planning

Terms

Conference: A meeting, retreat, seminar, symposium or event that involves attendee travel. The term "conference" also applies to training activities that are considered to be conferences under 5 CFR 410.404.

Conference lodging allowance: The rate that is up to 25 percent above the established lodging per diem rate.

Milestone schedule: Deadlines, which need to be reached in a progressive and orderly manner.

Planner: The person designated to oversee the conference.

Planning committee: Operational group significantly contributing to a conference's overall success and able to fully reflect the needs of both the agency and the attendees.

Getting Started

Depending on the size, type, and intended effect of the conference, start planning a minimum of one year in advance. Designate a planner and a planning committee.

Planning Committee

Functions typically include, but are not limited to:

- > Establishing a set of objectives.
- > Developing a theme.
- > Making recommendations for location, agenda, dates, and logistics, e.g., schedule, exhibits, speaker.
- > Making suggestions as to who should attend.
- > Serving as communications link between planners and participants.
- > Evaluation and follow-up.

Milestone Schedule

(a) Develop a milestone schedule, which is essential to conference planning, by working backward from the beginning date of the conference to include each major step. Examples include:

- > Planning committee meetings.
- > Preparation of mailing lists.
- > Letters of invitation.
- > Designation of speakers.
- > Confirmation letters to speakers.
- > Confirmation with site selection official.
- > Preparation of agenda.
- > Preparation of specification sheet.

- > Location and date selection.
- > Exhibits.
- > Budget.
- > Printing requirements.
- > Signage.
- > Conference information packages.
- > Scheduling photographer (if planned).
- > Use of agency seal and conference logo.
- > Handicapped requirements.
- > Planning of meals and refreshments, if appropriate.
- (b) Establish completion dates for each major step.
- (c) Update and revise the schedule as needed.

Specification Sheet

A detailed specification sheet is necessary to:

(a) Identify essential elements of a conference which typically include, but are not limited to:

> Sleeping rooms and on-site food services. It is generally best to estimate on the low side for the number of sleeping rooms and meals to be prepared. Facilities, unless there is only limited available space, are usually prepared to increase the number of sleeping rooms and meals; however, they discourage--and in some cases penalize--you if the sleeping room and meal guarantees are not met.

> Meeting rooms.

> Exhibit facilities.

> Audio-visual equipment and support services.

> Miscellaneous support services.

> Sleeping rooms with amenities, e.g., Internet access, data ports, conference call, and voice mail.

(b) Determine costs:

> Procurement. Bring contracting officer into the process early. All agreements and decisions should be written and agreed to by the agency-contracting officer before being sent to the facility.

> Government per diem rates. The government per diem rate applies to Federal attendees. Application of it to non-Federal attendees is at the discretion of the property and conference negotiator.

> Registration fee. Generally, the registration fee covers all direct expenditures of agency funds for planning and organization of a conference, e.g., meeting room accommodations, meals, light refreshments (if appropriate), speaker fees, publications, and materials. Anything directly relating to the conference, except liquor, can be included in the fee. To estimate the registration fee, divide the proposed budget by the estimated number of attendees.

Decide how the conference expenses (other than sleeping room accommodations and individual meals) will be paid, i.e., by the attendee from a training or registration fee, or directly by the agency.

Conference Site Selection

Minimize total costs, all factors considered.

Geographic Location

In determining where to locate the conference, consider:

- > Targeted audience.
- > Total costs, including per diem, transportation, and other.
- > Accessibility by car or air.
- > Whether recreational activities are necessary.
- > The expense of desired facility (significant savings can be achieved in off-season periods).

Types of Facilities

- > Federal Government. Use Government-owned or Government-provided conference facilities to the maximum extent possible.
- > Convention centers. Excellent for very large meetings, trade shows and exhibits; usually located near a large number of hotels.
- > Colleges and universities. Many have good meeting facilities and can offer sleeping accommodations when school is not in session.
- > Hotels. Commercial facilities that may be used to meet all conference needs or just the room night needs.
- > Conference centers. Dedicated meeting facilities; good for smaller meetings when numerous breakout sessions are planned.

Date Selection

For availability and economical reasons, the best months are April, May, September, October, and November. You should book the facility as early as possible to increase the chances of getting the date you want. However, pay particular attention to commitments for September or October due to fiscal year budget considerations.

Considerations When Choosing a Site

(a) Is the facility:

> Cost effective, e.g., are Government rates honored?

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> Safe, e.g., FEMA-approved?

> Is there on-site security personnel?

> Easily reached from an airport or by car?

> Clean?

> Well run, e.g., does the staff seem to be competent and responsive?

> Laid out in a functional way?

> Large enough to supply the number of sleeping rooms required?

> Set up to provide necessary conference registration equipment?

> Handicapped accessible?

(b) Parking:

> Is it adequate?

> How close to the facility is it?

> Is it secure and safe?

> Is the cost separate?

(c) Sleeping rooms:

> Will the facility make the reservations, or are you responsible for making the reservations for participants?

> What are the facility's registration rules?

> What are departure rules?

(d) Functionality of meeting rooms:

> Is appropriate space available?

> What costs are involved?

> Is needed equipment available (i.e., for conference registration, faxes, phones, computers, copiers)? Do not rent equipment unless it is absolutely unrealistic to bring your own.

> Are rooms designated for agency use for the duration of the conference?

> Are there columns that can block views?

> Are ceilings high enough for audio-video equipment?

> Are rooms suitable for both classroom and/or theatre setups?

> Are there windows? Shades?

> Are there manually-controlled thermostats?

> Are rooms handicapped accessible?

> Where are electrical outlets?

> Can the rooms be darkened?

> Would it be more economical to bring audio-visual equipment?

> Does the facility want meeting schedules and room layouts in writing in advance of the conference?

> If necessary, can the rooms be entered the evening before for an early setup?

> Will the facility arrange for room setup if given a layout?

- > What set-up costs are included?
- > What are departure rules?
- (e) Exhibits:

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- > If exhibits are planned, is suitable exhibit space available?
- > Are easels available at no cost?
- > What are the put-up and takedown times?
- > What costs are involved?
- > What about pre-delivery and after-conference arrangements?
- > If exhibits are shipped, know where and to whom they are to be sent.
- > If you are bringing large exhibits, determine location of loading dock, appropriate entrances and elevators.
- > Are there additional handling fees?
- > Check hotel policy on posting, size and appearance of signs.

Food and Drink

Meals

- > You can not generally use appropriated funds to pay for meals for employees at their official duty stations.
- > Employees on TDY travel may be served meals but cannot be reimbursed for those provided at government expense.
- > You should clarify in advance the appropriate per diem reduction(s) of meal(s) allowance(s) for TDY travel.
- > You may pay, or reimburse an employee for meals as necessary expenses incident to an authorized training program (under the Government Employees Training Act (GETA) at 5 U.S.C. 4104(4)), if a determination has been made that essential training will be conducted during the meal.
- > Work closely with the hotel to plan quality menus that fit within authorized per diem rates.
- > Clarify and agree in advance to the number of meal guarantees.
- > Ensure that gratuities and service charges are added to the cost of each meal, and determine the method of billing to be used (e.g., signed guarantee, collected meal tickets, or actual quantities consumed).
- > Confirm menus.

Breaks and Refreshments

Breaks should last no longer than 30 minutes and take place between meeting sessions. The following should also be considered when planning for refreshments:

- > Keep in mind that everyone does not drink coffee or tea.

- > You should clarify and agree in advance that coffee and pastries, if appropriate, are purchased by the gallon and dozen.
- > Try to avoid a per person charge.
- > Negotiate the cost into the contract.

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> Be conservative in your estimates. There are seldom 100 percent of the conference participants attending any one function.

> If coffee, soft drinks, and water are not included in the fee, are they available ``at cost" to the attendee?

Account Reconciliation

It is important to request that the hotel bill be prepared in a logical and chronological sequence, and that backup data accompany the bill. Generally, the hotel will complete its accounting of the conference within two weeks of the conclusion.

Notification

Announcement and/or Invitations

Announcement of the planned conference should be made as early as possible, even one year in advance; invitation letters, 8 weeks in advance. They should include, but are not limited to:

- > Point of contact name and telephone number.
- > Registration form, card, or Internet address (include space for identifying handicapped requirements).
- > Registration instructions.
- > Registration deadline date.
- > Detailed area map and driving instructions.
- > Information on traffic patterns to avoid rush hour delays.
- > Promotional brochures from the facility.
- > Layout of facility including telephone numbers.

- > Breakdown of costs showing any difference from travel versus training object classes, particularly meal costs, so that proper reimbursement can be made.
- > Agenda with a list of speakers and topics.
- > Activity schedule for spouses and guests (all charges or costs attributed to spouses or guests must be borne by the individual attendee (not reimbursable by the Government)).
- > Provide a sample travel voucher.
- > Notice that conference lodging allowance applies if applicable.

Confirmations

You should:

- > Decide on the speaker(s) and the message you wish to be conveyed and obtain early commitment(s) in writing.
- > Confirm conference dates/times/topics/arrival and departure times with speaker(s) and any other special guests at least 30 days in advance.
- > Conduct a final planning committee meeting to confirm all plans.
- > Confirm photographer's schedule.
- > Confirm hotel plans at least one day in advance.

Facility Process

Check-In and -Out

Streamline the process:

- > Will the facility need additional personnel?
- > Is electronic one-stop processing available?
- > Is luggage storage and shuttle service available?
- > Arrange parking for any special guests.
- > Provide signage.

Registration Process

Registration is generally the attendees' introduction to the conference. Give it special attention by:

- > Using directional signs.
- > Placing especially attractive or important exhibits nearby.
- > Planning for late arrivals.
- > Using state-of-the-art processing.
- > Checking out the registration capabilities of using GSA's electronic SmartPay System.
- > Providing for handicapped attendees.

Conference Information Package

Each registrant should be given a conference information package. Used regularly during the conference, the conference information package should be accurate, beneficial, and reflect detailed information on a daily/hourly basis. If time allows, you may want to finalize the package and send it to the printer at least 4 weeks in advance of the starting date. The program will be widely used, so you may want to print twice as many copies of the program as you have expected attendees. The information package, for example, may contain:

- > A list of everything in the package.
- > A "welcome" letter.
- > A schedule.
- > Workshop agendas.
- > Discussion of exhibits.
- > Panelists' information.
- > Photos and biographies of speakers/special guests.
- > Facility layout and list of services available.
- > Identify designated smoking areas.
- > Special events.
- > Message center information.
- > Area map.
- > Other pertinent material.

Note: Use of agency seal and conference logo may be considered for the conference package. However, the decision to use such items is strictly the judgment of agency officials.

Miscellaneous

Suggested Room Coordination

Plan ahead to setup:

- > Staff room to handle core of activities;
- > Meal functions;
- > Exhibit rooms, and
- > Meeting rooms--

Theatre or auditorium for lectures; Facing speaker when note taking is important; Square or U-shaped style for discussion/interaction; and Banquet or roundtable for discussion.

Keeping in Touch

Plan for:

- > A message center to be set up in a central location for special announcements and telephone messages.
- > How to reach whomever at all times use beepers and walkie-talkies.
- > Clear identification of conference staff.
- > Accommodation of physically impaired attendees with sign language or other special needs.

Mementos

Appropriations are not available to purchase memento items for distribution to conference attendees as a remembrance of an event. Two notable exceptions to the memento or gift prohibition are under training and awards. Work closely with appropriate agency officials to make final determinations.

Resources

The following resources may be of assistance in planning a conference:

- > An agency contracting officer;
- > Travel Management Centers;
- > Interagency Travel Management Committee members (a forum of agency travel policy managers--for member identification, contact your agency's administrative or financial office);
- > State chambers of Commerce or Visitors Bureaus;
- > Local chapters of the Society of Government Meeting Professionals; and
- > Private industry conference planners.

Conclusion

Process:

- > Questionnaires, which may provide invaluable feedback about the success of your conference.
- > Training certificates.
- > Thank you notes to participants, facility personnel, speakers, printers, photographers, and other special contributors.
- > Summary to acknowledge the accomplishments, and to convey the information discussed to a wider audience, may be an excellent promotional tool.

Note to Appendix E: Use of pronouns ``we", ``you", and their variants throughout this appendix refers to the agency.

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Administrator of General Services.

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